



**GUAM VISITORS BUREAU
Japan Visitor Tracker Exit Profile
FY2010 MARKET SEGMENTATION –
JANUARY 2010**



Prepared by: QMark Research

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Background & Methodology

- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, QMark's professional Japanese speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **330** departing Japanese visitors were randomly interviewed at the Guam A.B. Wonpat International Airport's departure and waiting areas.
- The margin of error for a sample of **330** is +/- 5.4 percentage points with a 95% confidence level. That is, if all Japanese visitors who traveled to Guam in the same time period were asked these questions, we can be 95% certain that their responses would not differ by +/- 5.4 percentage points.

OBJECTIVES

- **The specific objectives of the analysis were:**
 - To determine the relative size and expenditure behavior of the following market segments:
 - Divers
 - Families
 - Golfers
 - Group Travelers
 - OL's/ salary women
 - Seniors
 - Shoppers
 - Repeat Visitors
 - Students
 - Visitors coming to Guam for a wedding
 - Honeymooners
 - To identify (for all Japanese visitors) the most important determinants of on-island spending; and
 - To identify the most significant factors affecting overall visitor satisfaction.

Highlighted Segments

Parameters

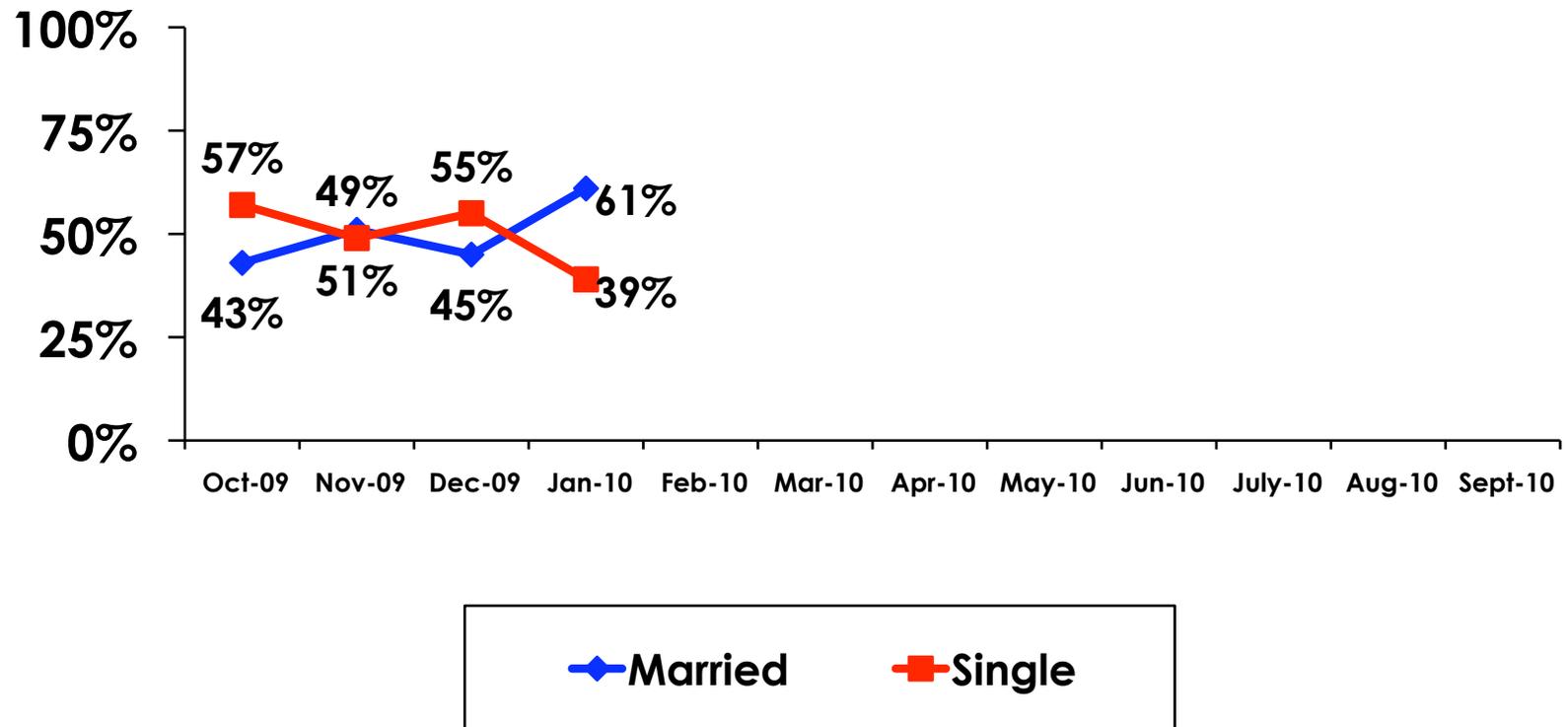
- Families – Q.6
- Repeaters – Q.3A
- Shoppers – Q.19
- Seniors – Q.D/ 51+
- OL/Salary Woman – Q.29/female
- Group Travelers – Q.7
- Students – Q.29
- Golfers – Q.19
- Wedding – Q.5A
- Divers – Q.19
- Honeymooners – Q.5A

Highlighted Segments

	Oct 09	Nov 09	Dec 09	Jan 10	Feb 10	Mar 10	Apr 10	May 10	Jun 10	July 10	Aug 10	Sept 10
Families	21%	22%	21%	25%								
Repeaters	40%	33%	40%	42%								
Shoppers	49%	52%	46%	49%								
Seniors	5%	6%	9%	8%								
OL/Salary-woman	15%	12%	12%	13%								
Group Travelers	3%	7%	3%	4%								
Students	9%	10%	16%	10%								
Golfers	4%	6%	6%	6%								
Wedding	8%	12%	7%	8%								
Divers	6%	12%	10%	11%								
Honey-mooner	11%	9%	8%	7%								
TOTAL	328	330	330	330								

SECTION 1 **PROFILE OF RESPONDENTS**

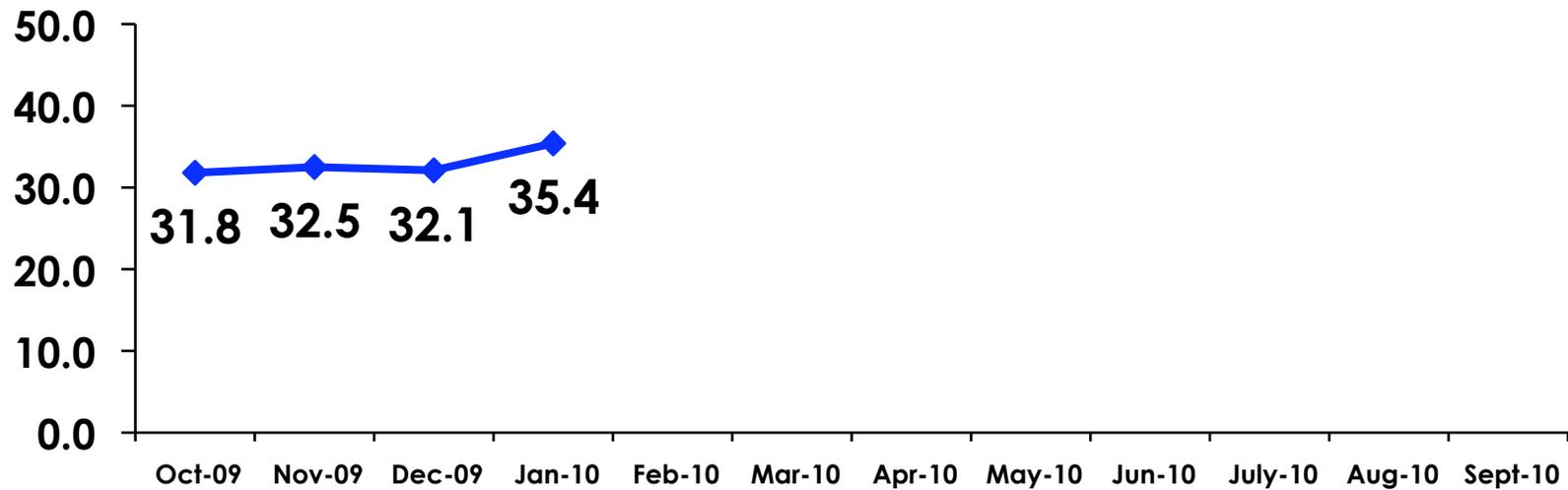
MARITAL STATUS - TRACKING



MARITAL STATUS -SEGMENTATION

	TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR	
C. Married	Count	197	92	126	98	16	7	1	18	10	12	19	36
	Col %	61%	32%	69%	64%	36%	88%	5%	72%	59%	80%	59%	97%
Single	Count	126	20	57	54	28	1	18	7	7	3	13	1
	Col %	39%	18%	31%	36%	64%	13%	95%	28%	41%	20%	41%	3%
Total	Count	323	112	183	152	44	8	19	25	17	15	32	37

AVERAGE AGE - TRACKING



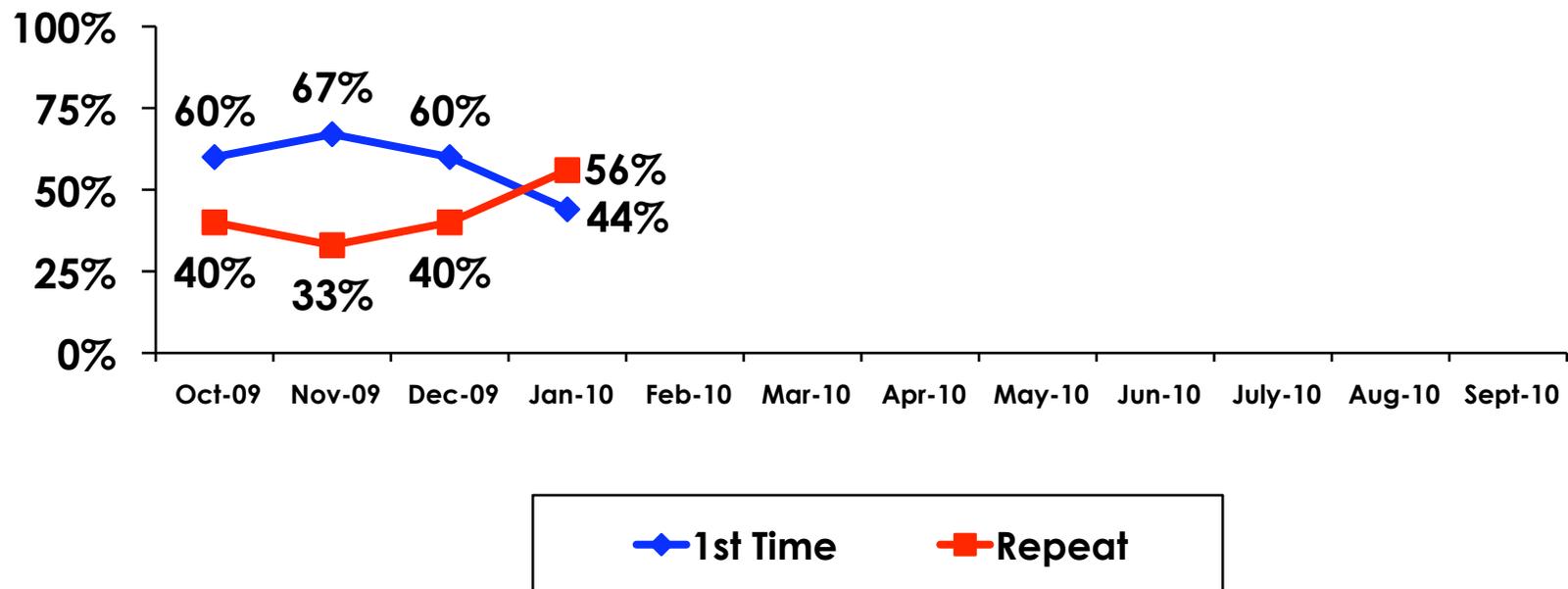
AGE- SEGMENTATION

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
D.	18-34	Count	175	38	78	78	31	3	19	5	10	13	18
		Col %	53%	33%	42%	51%	70%	38%	100%	19%	59%	81%	53%
	35-54	Count	131	69	89	67	12	4		19	6	2	11
		Col %	40%	60%	48%	44%	27%	50%		73%	35%	13%	32%
	55+	Count	24	8	19	9	1	1		2	1	1	5
		Col %	7%	7%	10%	6%	2%	13%		8%	6%	6%	15%
Total	Count		330	115	186	154	44	8	19	26	17	16	34
D.	Mean		35.4	38.9	38.2	35.8	32.6	43.5	21.2	39.6	34.6	30.6	36.3
	Median		34	39	37	34	30	42	22	40	32	29	34

INCOME - SEGMENTATION

			TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q.31 Less than Y2 million	Count		10	2	4	4	1			1	1		2	2
	Col %		3%	2%	2%	3%	2%			4%	7%		6%	6%
Y2,000,001 - Y3,000,000	Count		29	9	14	15	12	2	2	2	1	1	3	2
	Col %		10%	9%	8%	11%	29%	29%	13%	8%	7%	7%	10%	6%
Y3,000,001 - Y4,000,000	Count		40	7	16	19	8	1	1	2	4	6	5	2
	Col %		14%	7%	10%	14%	19%	14%	6%	8%	29%	40%	16%	6%
Y4,000,001 - Y5,000,000	Count		37	8	22	16	4		3		3	3	3	5
	Col %		13%	8%	13%	12%	10%		19%		21%	20%	10%	15%
Y5,000,00 - Y7,000,000	Count		76	30	45	37	5	2	3	8	5	3	9	8
	Col %		26%	30%	27%	27%	12%	29%	19%	33%	36%	20%	29%	24%
Y7,000,001 - Y10,000,000	Count		50	25	36	19	5		4	2			3	10
	Col %		17%	25%	22%	14%	12%		25%	8%			10%	30%
Y10,000,001 or more	Count		46	20	27	27	7	2	2	9		2	6	4
	Col %		16%	20%	16%	20%	17%	29%	13%	38%		13%	19%	12%
No Income	Count		2		1	1			1					
	Col %		1%		1%	1%			6%					
Total	Count		290	101	165	138	42	7	16	24	14	15	31	33

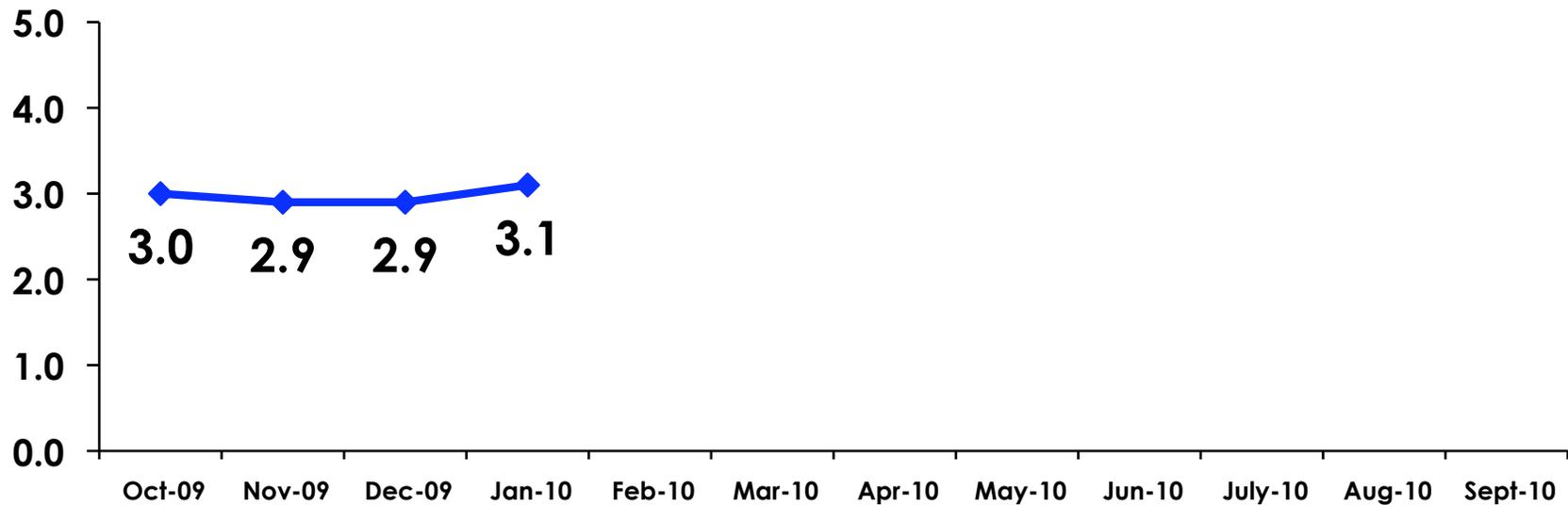
PRIOR TRIPS TO GUAM - TRACKING



PRIOR TRIPS TO GUAM - SEGMENTATION

			TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q.3A Yes	Count		144	44		78	21	3	15	8	8	13	16	10
	Col %		44%	38%		51%	48%	38%	79%	31%	47%	81%	47%	26%
No	Count		186	71	186	76	23	5	4	18	9	3	18	29
	Col %		56%	62%	100%	49%	52%	63%	21%	69%	53%	19%	53%	74%
Total	Count		330	115	186	154	44	8	19	26	17	16	34	39

AVG LENGTH OF STAY - TRACKING



AVG LENGTH OF STAY - SEGMENTATION

	TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q 8 Mean	3.1	3.4	3.3	3.2	3.1	3.0	2.8	3.5	3.4	3.6	3.2	3.3
Median	3	3	3	3	3	3	3	3	3	4	3	3
Minimum	1	2	1	2	2	3	2	2	2	2	2	2
Maximum	13	13	13	8	5	3	4	7	5	5	5	6

SECTION 2 **TRAVEL PLANNING**

TRAVEL PLANNING - SEGMENTATION

			TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q.7	Full package tours	Count	64	25	31	33	12		4	4	5	6	5	9
		Col %	20%	22%	17%	21%	27%		21%	15%	29%	38%	15%	23%
	Free-time package tours	Count	192	59	102	88	24		12	14	9	8	23	18
		Col %	59%	51%	55%	57%	55%		63%	54%	53%	50%	68%	46%
	Individually arranged travel	Count	60	25	46	28	6		3	6	2	1	5	10
		Col %	18%	22%	25%	18%	14%		16%	23%	12%	6%	15%	26%
	Group tour	Count	8	3	5	3	2	8					1	2
		Col %	2%	3%	3%	2%	5%	100%					3%	5%
	Other	Count	4	3	2	2					1	1		
		Col %	1%	3%	1%	1%					6%	6%		
Total	Count	328	115	186	154	44		8	19	26	17	16	34	39

TRAVEL MOTIVATION - SEGMENTATION

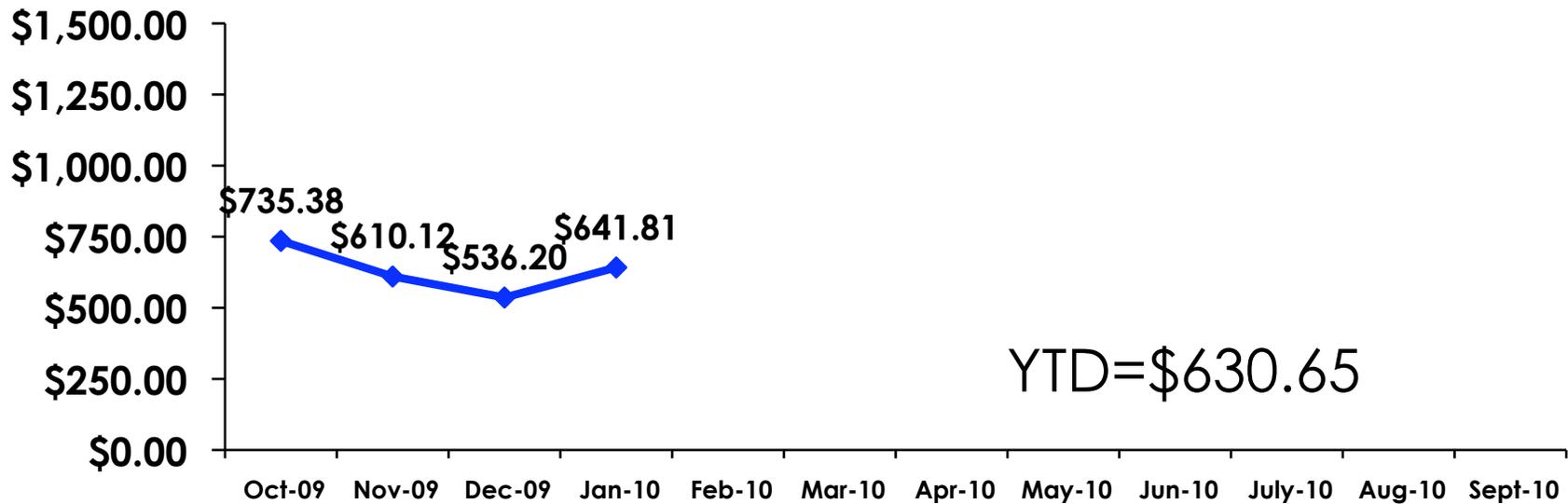
	TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q.5 Beautiful seas, beaches, tropical climate	60%	65%	55%	60%	57%	38%	74%	50%	41%	69%	59%	54%
Short travel time	45%	47%	47%	49%	39%	13%	26%	38%	18%	50%	38%	41%
Just to relax	40%	41%	40%	43%	32%		21%	54%	12%	13%	41%	38%
Pleasure	39%	49%	34%	45%	32%	25%	53%	27%	12%	19%	38%	28%
A previous visit	34%	38%	60%	32%	23%	25%	5%	42%	18%	13%	21%	44%
Shopping	29%	31%	31%	33%	34%	25%	32%	23%	18%	19%	26%	33%
Price of the tour package	32%	21%	24%	32%	34%		47%	23%	6%	31%	24%	36%
It is a safe place to spend a vacation	22%	29%	25%	21%	18%	13%	16%	23%	18%	6%	15%	28%
Water sports	16%	12%	11%	18%	16%		42%	12%		19%	24%	15%
Recommendation of friend, relative, travel agency	12%	10%	5%	18%	18%	13%	21%	12%	12%	13%	12%	8%
SCUBA diving	7%	1%	7%	9%	2%		5%			6%	47%	15%
To golf	6%	4%	9%	6%	7%	13%		54%		6%	3%	10%
To get married or Attend wedding	5%	7%	5%	5%	5%				100%	13%	6%	3%
Honeymoon	5%	2%	2%	7%	5%			4%	12%	100%	12%	3%
Other	4%	6%	5%	4%	5%		5%	4%			3%	10%
Company or Business trip	2%	1%	2%	3%	7%	50%		4%			6%	
My company sponsored me	2%	3%	2%	2%								3%
Career certification or testing	2%		3%	1%			5%					3%
Special promotion	1%	1%	1%	1%	5%			4%			3%	3%
To visit friends or relatives	1%	2%	1%	1%			5%				3%	3%
Organized Sporting Activity	1%	2%	1%	1%								5%
Promotional materials from GVB	1%	2%	1%	1%				4%				
Convention, Conference, Trade show	0%											
Total Cases	330	115	186	154	44	8	19	26	17	16	34	39

INFORMATION SOURCES - SEGMENTATION

	TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Q.1 Internet	66%	63%	66%	65%	57%		78%	58%	76%	69%	76%	49%
I have been to Guam before	49%	55%	86%	44%	50%	63%	22%	65%	41%	13%	35%	67%
Travel guide book at bookstores	58%	52%	46%	55%	61%	50%	83%	31%	47%	63%	56%	49%
Travel agent brochure	38%	41%	28%	41%	30%	50%	39%	27%	41%	69%	41%	44%
Friend or relative	16%	15%	9%	21%	18%		33%	23%	29%	19%	15%	8%
Magazine	17%	14%	12%	18%	14%	25%	28%	12%		19%	15%	21%
TV	6%	7%	5%	8%	9%		6%	4%			9%	10%
Newspaper	2%	4%	3%	3%	2%	13%						13%
Company travel department	3%		1%	5%	7%	13%		4%		6%	9%	
GVB office	1%	1%	2%	1%			6%					3%
Other	1%		2%	1%				4%			6%	3%
GVB promotional activities	1%	3%	1%		2%							3%
Total Cases	325	114	185	152	44	8	18	26	17	16	34	39

SECTION 3 **EXPENDITURES**

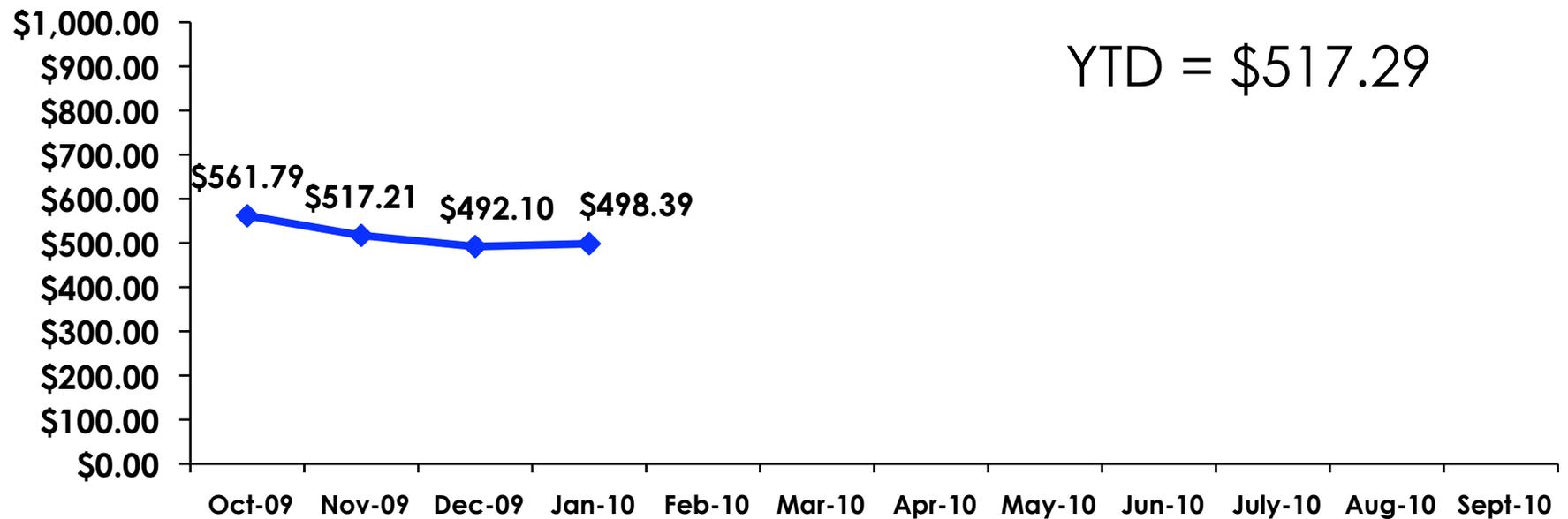
PREPAID EXPENDITURES - TRACKING



PREPAID EXPENDITURES PER PERSON -SEGMENTATION

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Prepaid per person converted to \$	Mean	\$641.81	\$650.51	\$623.16	\$666.71	\$817.85	\$612.68	\$453.15	\$702.81	\$761.55	\$1,115.62	\$748.62	\$600.98
	Median	\$545	\$654	\$545	\$566	\$572	\$327	\$490	\$613	\$705	\$980	\$681	\$545
	Minimum	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$81.69	\$0.00	\$0.00	\$0.00
	Maximum	\$8,713.65	\$2,450.71	\$8,713.65	\$8,713.65	\$8,713.65	\$1,960.57	\$762.44	\$1,960.57	\$2,178.41	\$2,420.46	\$2,420.46	\$2,420.46

ON-ISLAND EXPENDITURES - TRACKING



ON-ISLAND EXPENDITURES PER PERSON - SEGMENTATION

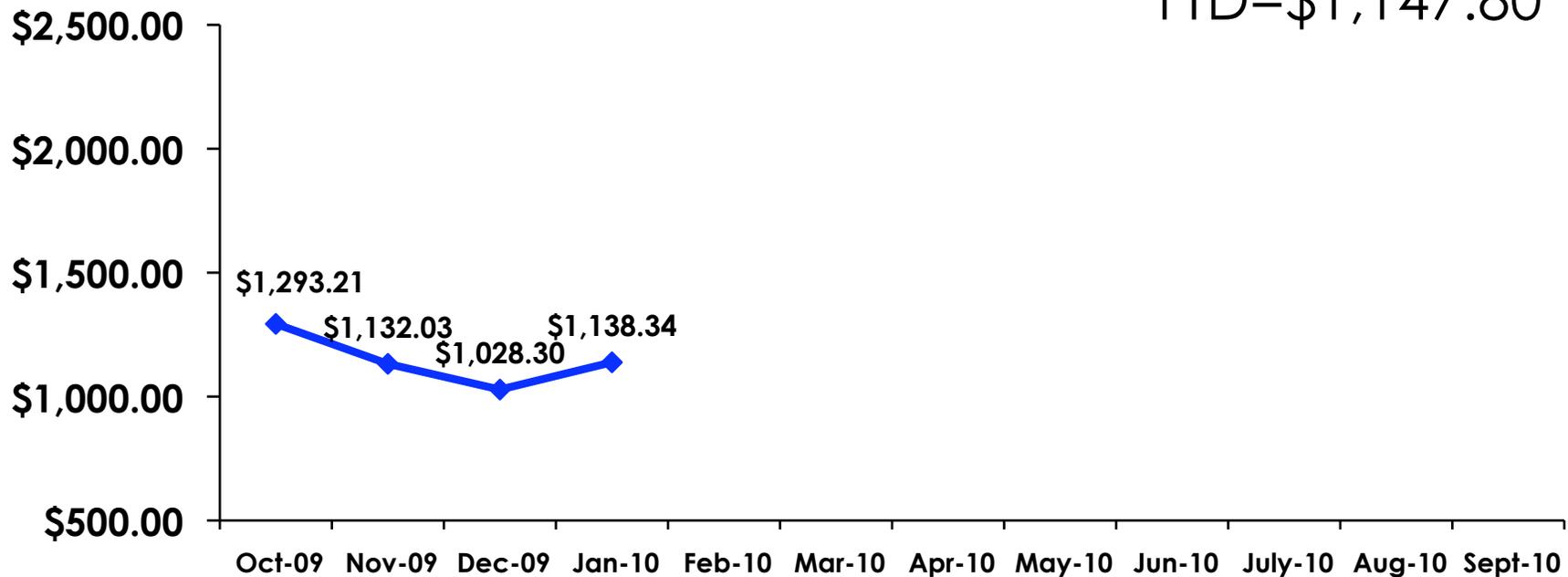
		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Per person on-island exp	Mean	\$498.39	\$421.17	\$489.97	\$579.68	\$788.84	\$536.67	\$372.58	\$554.22	\$453.99	\$607.88	\$763.21	\$560.41
	Median	\$350	\$300	\$400	\$400	\$500	\$575	\$275	\$450	\$358	\$495	\$559	\$500
	Minimum	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$133.33	\$78.00	\$0.00	\$0.00	\$0.00	\$100.00	\$0.00
	Maximum	\$5,350.00	\$2,166.67	\$3,062.00	\$5,350.00	\$5,350.00	\$950.00	\$1,000.00	\$2,166.67	\$1,800.00	\$1,900.00	\$3,062.00	\$1,325.00

ON-ISLAND EXPENSE- BREAKDOWN

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
F&B-HOTEL	Mean	\$44.59	\$75.48	\$53.47	\$46.09	\$21.48	\$12.75	\$13.79	\$67.96	\$22.94	\$90.00	\$71.47	\$72.00
	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$20.00	\$0.00	\$0.00
F&B-FF REST/CONV	Mean	\$40.45	\$52.46	\$37.24	\$56.49	\$31.70	\$13.50	\$40.21	\$41.08	\$37.06	\$68.44	\$36.09	\$34.33
	Median	\$10.00	\$20.00	\$10.00	\$30.00	\$5.00	\$0.00	\$8.00	\$4.00	\$0.00	\$45.00	\$14.00	\$10.00
F&B-OUT- SIDE HOTEL/ REST	Mean	\$88.03	\$108.46	\$93.22	\$99.64	\$55.57	\$15.63	\$36.53	\$102.50	\$65.76	\$102.06	\$104.59	\$89.18
	Median	\$25.00	\$0.00	\$20.00	\$50.00	\$0.00	\$0.00	\$40.00	\$0.00	\$0.00	\$71.50	\$63.00	\$0.00
OPTIONAL TOUR	Mean	\$108.74	\$133.91	\$104.74	\$129.53	\$105.89	\$158.75	\$69.47	\$169.62	\$63.53	\$197.50	\$190.82	\$149.72
	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$35.00	\$0.00	\$50.00	\$0.00	\$100.00	\$150.00	\$0.00
GIFT/ SOUV-SELF	Mean	\$268.35	\$350.86	\$287.96	\$361.10	\$420.14	\$92.50	\$67.95	\$437.31	\$176.12	\$401.88	\$398.85	\$144.82
	Median	\$50.00	\$50.00	\$50.00	\$100.00	\$65.00	\$0.00	\$50.00	\$125.00	\$0.00	\$65.00	\$100.00	\$0.00
GIFT/ SOUV- F&F AT HOME	Mean	\$130.30	\$134.10	\$108.30	\$170.29	\$151.64	\$93.75	\$70.53	\$177.31	\$173.53	\$358.13	\$182.65	\$180.00
	Median	\$50.00	\$30.00	\$50.00	\$100.00	\$15.00	\$50.00	\$60.00	\$100.00	\$0.00	\$350.00	\$100.00	\$100.00
LOCAL TRANS	Mean	\$22.43	\$27.33	\$27.20	\$29.21	\$10.25	\$7.50	\$4.58	\$38.27	\$9.82	\$18.06	\$25.38	\$30.49
	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
OTHER EXP	Mean	\$215.30	\$292.82	\$265.90	\$193.18	\$183.80	\$531.88	\$265.58	\$203.38	\$256.76	\$35.94	\$205.21	\$413.87
	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$45.00

TOTAL EXPENDITURES -TRACKING

YTD=\$1,147.80



TOTAL EXPENDITURES PER PERSON - SEGMENTATION

		TOTAL	FAMILY	REPEAT	SHOPPER	OFFICE LADY	GROUP	STUDENT	GOLF	WEDDING	HONEYMOON	DIVE	SENIOR
Total	Mean	\$1,138.34	\$1,071.68	\$1,109.72	\$1,242.56	\$1,596.58	\$1,149.35	\$825.73	\$1,257.03	\$1,212.67	\$1,723.49	\$1,511.82	\$1,162.98
per	Median	\$980.29	\$1,027.80	\$995.78	\$1,066.90	\$1,270.33	\$1,033.92	\$744.60	\$1,092.14	\$1,021.36	\$1,831.51	\$1,239.21	\$1,030.68
person	Minimum	\$0.00	\$0.00	\$0.00	\$0.00	\$200.00	\$190.00	\$78.00	\$0.00	\$331.69	\$200.00	\$571.32	\$0.00
expense	Maximum	\$9,713.65	\$3,670.46	\$9,713.65	\$9,713.65	\$9,713.65	\$2,510.57	\$1,762.44	\$2,820.19	\$2,958.41	\$3,670.46	\$3,670.46	\$3,670.46

SECTION 4
ADVANCED STATISTICS

ANALYSIS TECHNIQUE

- Dependent variables: total per person on island expenditure and overall satisfaction (numeric)
- Independent variables are satisfaction with different aspects of trip to Guam (numeric).
- Use of linear stepwise regression to derive predictors (drivers) of on-island expenditure and overall satisfaction, Since both the independent and dependent variables are numeric.
- This determines the significant ($p < .05$) drivers and the percentage of the dependent variables accounted for by each significant predictor and by all of them combined.

Comparison of Drivers of Overall Satisfaction, Oct, Nov, Dec 2009, Jan 2010, Overall Oct 2009 - Jan 2010					
	Oct-09	Nov-09	Dec-09	Jan-10	Combined Oct 2009 - Jan 2010
Independent Variables:	rank	rank	rank	rank	rank
Cleanliness of beaches & parks	4		3		5
Ease of getting around		2	4	2	3
Safety walking around at night					
Quality of daytime tours		3			4
Variety of daytime tours	3			4	
Quality of nighttime tours					
Variety of nighttime tours					
Quality of shopping	1	4		1	1
Variety of shopping			2		6
Price of things on Guam					
Quality of hotel accommodations	2	1	1	3	2
% of Overall Satisfaction Accounted For	52.1%	46.7%	49.2%	51.1%	49.8%

NOTE: Only significant variables are ranked.

DRIVERS OF OVERALL SATISFACTION

- **Overall satisfaction** with the Japanese visitor's experience on Guam is driven by four significant factors in the Jan 2010 Period. By rank order they are:
 - **Quality of shopping,**
 - **Ease of getting around,**
 - **Quality of hotel accommodations, and**
 - **Variety of daytime tours.**
- With all four factors the overall r^2 is .511 meaning that **51.1% of overall satisfaction is accounted for by these four factors.**

Comparison of Drivers of Per Person On Island Expenditure, Oct, Nov, Dec 2009, Jan 2010, Overall Oct 2009 - Jan 2010					
	Oct-09	Nov-09	Dec-09	Jan-10	Combined Oct 2009 - Jan 2010
Independent Variables:	rank	rank	rank	rank	rank
Cleanliness of beaches & parks				3	2
Ease of getting around					
Safety walking around at night					
Quality of daytime tours				2	
Variety of daytime tours					
Quality of nighttime tours					
Variety of nighttime tours		1			
Quality of shopping			1		1
Variety of shopping				1	
Price of things on Guam					
Quality of hotel accommodations					
% of Overall Satisfaction Accounted For	0.0%	1.5%	2.8%	5.6%	1.2%
NOTE: Only significant variables are ranked.					

Drivers of Per Person On Island Expenditure

- **Per Person On-Island Expenditure** is driven by three significant factors in the Jan 2010 Period. By rank order they are:
 - **Variety of shopping,**
 - **Quality of daytime tours,** and
 - **Cleanliness of beaches & parks.**
- With all three factors the overall r^2 is .056 meaning that **5.6% of per person on-island expenditure is accounted for by these three factors.**